



Organization Administrator





Introductions



- Name
- From (what agency?)
- Are you a current Comm-Pass user?





Class Objectives



In today's session, we will perform the following actions required for successful implementation of your organization:

- Add and Maintain Departments and Locations
- Add and Maintain Users
- Set up Approval Paths



Overview of COMMBUYS



What is COMMBUYS?

It is the Commonwealth of Massachusetts' Executive Office for Administration and Finance, Operational Services Division(OSD) web-based Electronic Procurement and Purchasing System, referred to as COMMBUYS.

COMMBUYS will replace the existing Commonwealth Procurement Access & Solicitation System (Comm-PASS) bid solicitation system with a fully functional and integrated eProcurement system.



COMMBUYS puts Commonwealth agencies in the driver's seat, fully automating the procurement process and supporting data-driven business decisions.



Project Schedule



**COMMBUYS Go Live
Phase I**
March 24, 2014
(Comm-PASS retired)

**COMMBUYS
Phase II**
September 2014

**Winter -
Summer 2015**

Summer 2013

- Contract awarded (June) and project launched
- Team ramp up
- Application review

Fall 2013

- Functional requirements and design
- Agency readiness program launched
- Vendor outreach campaign launched

Winter 2014

- Application configuration and User Acceptance Testing
- End User training
- Agency readiness program continues

Spring/Summer 2014

- Build interfaces to MMARS and other systems
- Ongoing End User training
- Ongoing outreach to municipal governments and other eligible entities



Procurement Policy Update



The way departments currently do business with OSD is not changing.

- Existing OSD policy is not changing.
- Existing Finance policy is not changing.
- COMMBUYS is a new system tool departments will use for procurement and purchasing.
- New COMMBUYS policy will be introduced in March on how departments will use the system for procurement and purchasing.





Executive Agency Procurement Responsibilities



- Use all Statewide Contracts, if available.
- Comply with all applicable laws, regulations, policies and procedures.
- Accept responsibility and be accountable for procurement.
- Conduct open, fair and competitive procurements.
- Maintain and update QQ Free Form solicitations and contracts in Comm-PASS.
- Review Contract and records management.



COMMBUYS Terminology



Comm-PASS Term	COMMBUYS Term
Solicitation (all types)	Bid
Vendor Responses, Proposals	Quote
Statewide or Departmental Contract	Master/Blanket Purchase Order
Purchase off SWC	Release Requisition
Not on a contract or Incidental	Open Market Requisition
Request for Purchase	Requisition



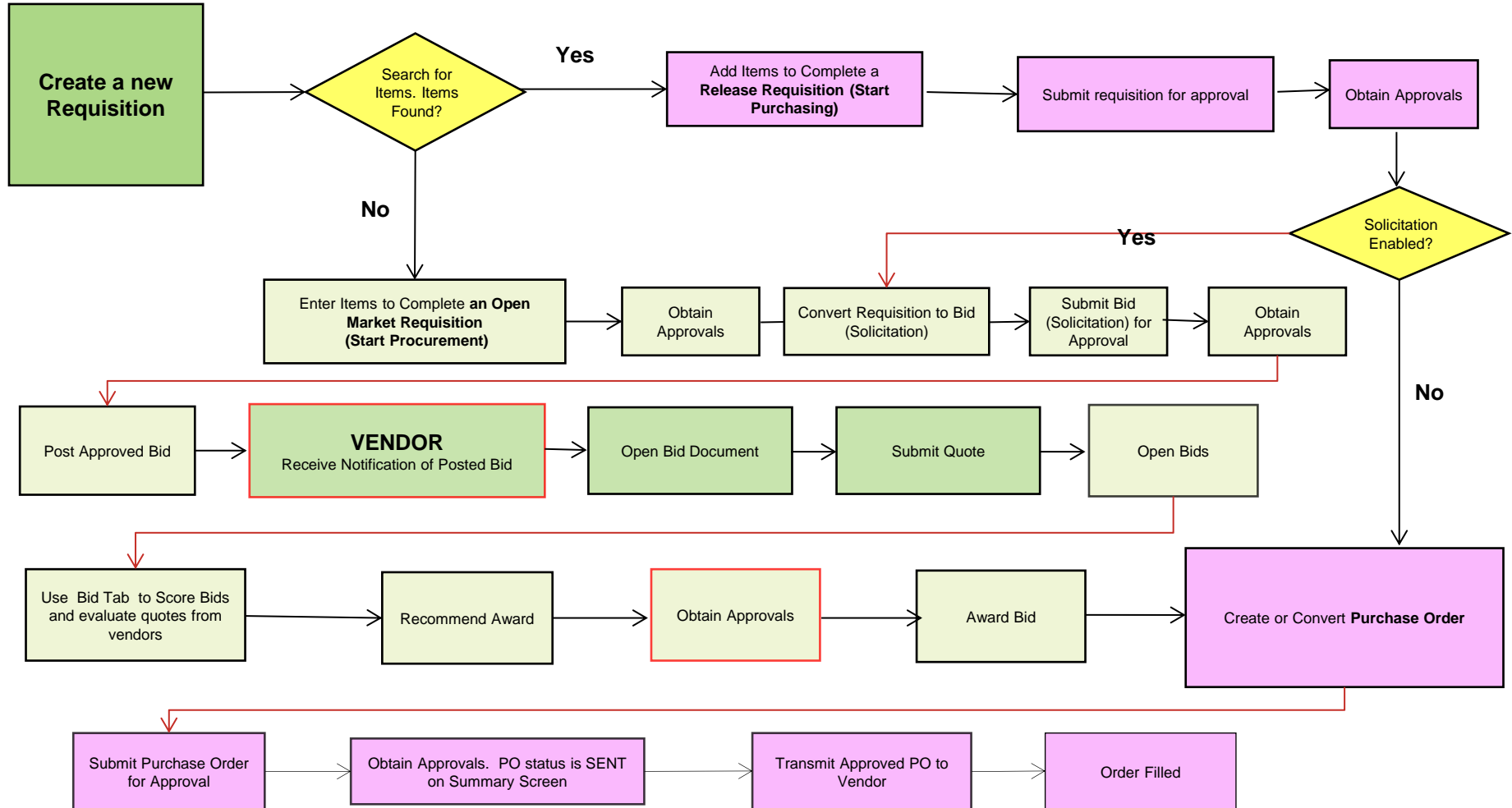
Document Types



Name	Types
Requisitions	<ul style="list-style-type: none">• Release: is a purchase from a Master Blanket Purchase Order/Contract• Open Market: is not on a Master Blanket Purchase Order/Contract• RPA: is for emergency purchases
Bids	<ul style="list-style-type: none">• Open: any vendor can submit a response• Closed: only selected vendors can see a bid
Purchase Orders	<ul style="list-style-type: none">• Open Market: refers to procuring goods or services not on a contract• Blanket: is the terminology for a contract• G2B: is a catalog• Change Order: request to change a Purchase Order



CommBuys Workflow

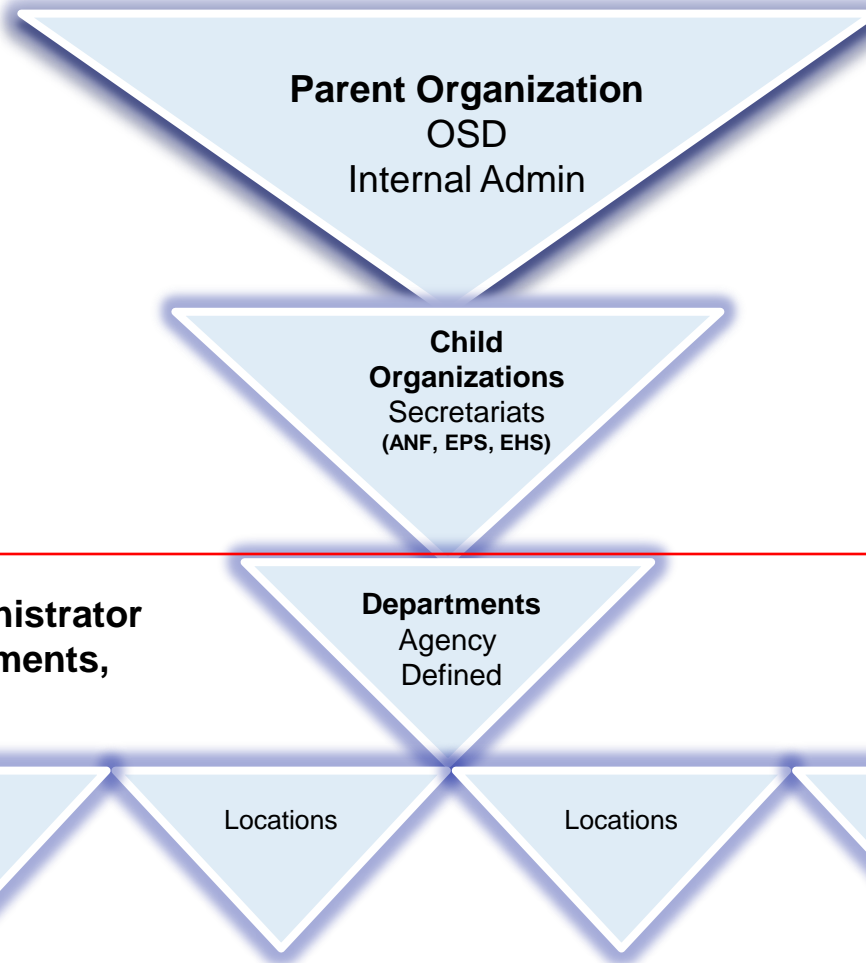




Organizational Structure



**Preloaded into
Commbuys**



**The Organization Administrator
needs to set-up Departments,
Locations and Users**

User Roles in COMMBUYS

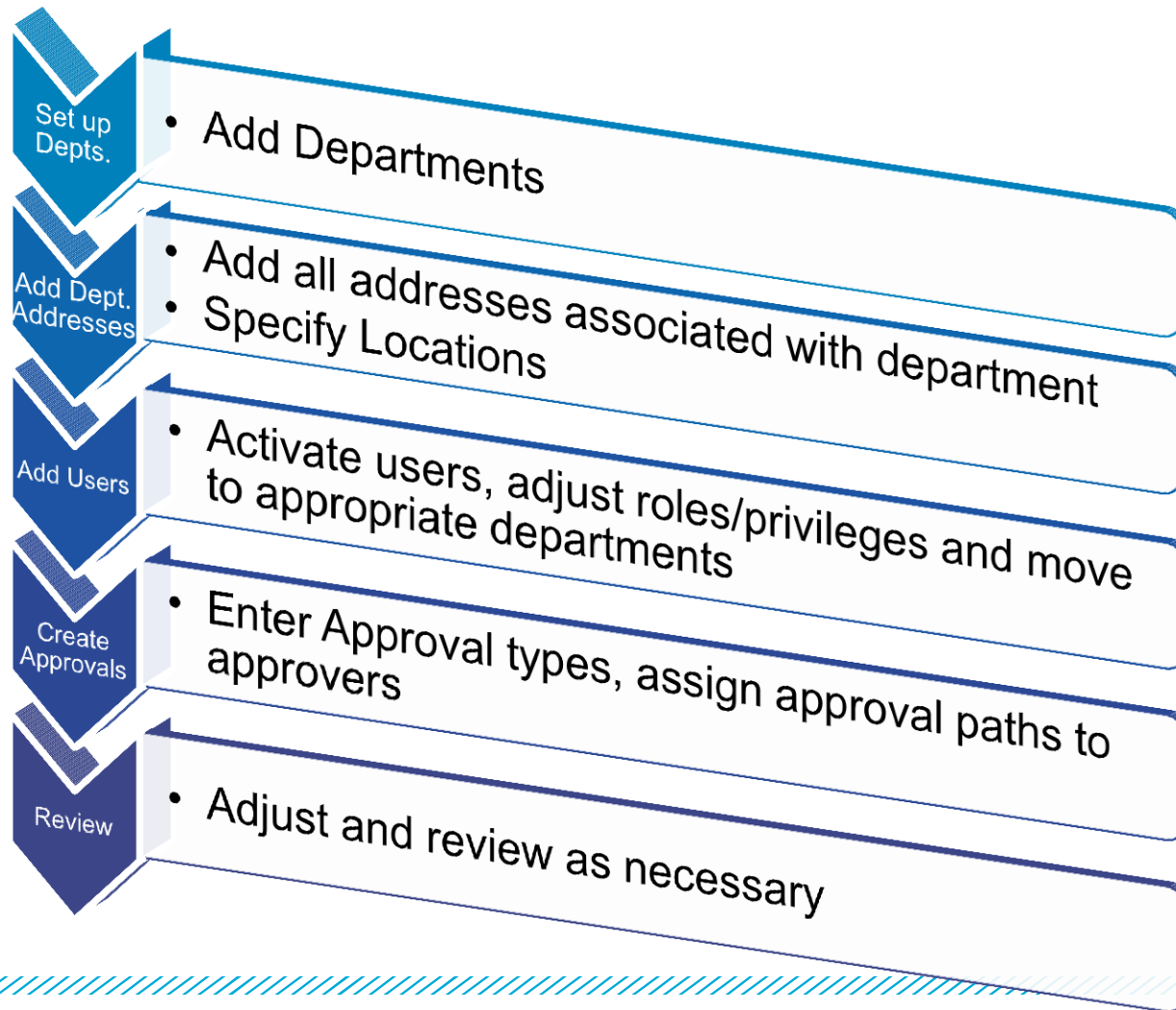


OPERATIONAL SERVICES DIVISION

ROLE	Function
Internal Administrator	<ul style="list-style-type: none"> OSD only role; Internal Administrators serve as the top-level administrator within the system and are able to determine which organizations and vendors have access to the system, as well as to manage centralized document and accounting settings, access restrictions and the look and architecture of the system.
Organization Administrator	<ul style="list-style-type: none"> Set-up users in the procurement process for an organization, including its Departments, Locations, users and approval paths. Procurement managers have the role of Organization Administrator.
Basic Purchasing (BP)	<ul style="list-style-type: none"> Create and view all purchasing documents including Requisitions, Receipts, Purchase Orders, Bids and their related documents such as Amendments and Change Orders.
Department Access (DA)	<ul style="list-style-type: none"> Create Requisitions and/or approve the Requisitions of others. Generates requisitions, solicitations off SWC/ blankets
Inquiry	<ul style="list-style-type: none"> View documents for their Organization, but are unable to control or edit any document. Auditors are given the Inquiry role. Can view fully executed documents (does not include drafts or documents in the process of scoring) but does not allow them to make any changes or take any actions that impact documents or related processes. <p><i>* The difference between what a public user can see and what an Inquiry user can see is that public users never see any requisitions, receipts(phase 2) or the approval audit trail internal to the purchasing organization – using the public view they only see Bids, Contracts and Bid Award.</i></p>



OA Basic Set-up Tasks

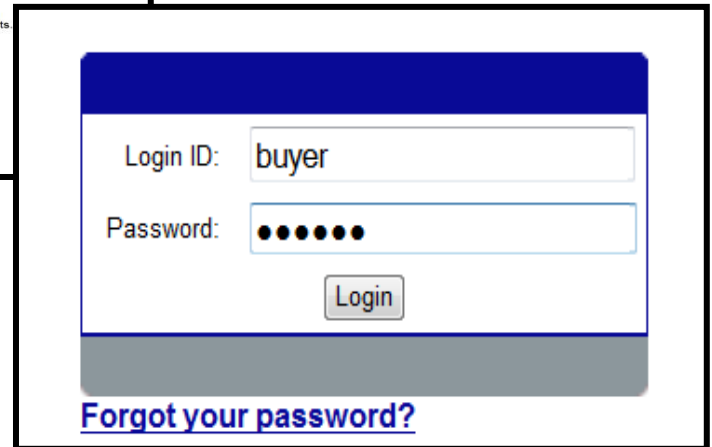
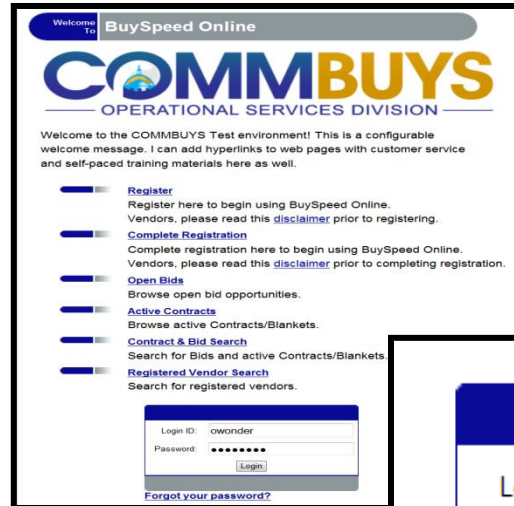




Initial COMMBUYS Login



- <https://www.training.commbuys.com/bso/>
- COMMBUYS login page
- Enter a Login ID / Password
- Click the **Login** button

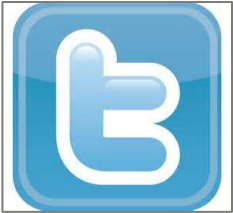


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May 1, 2014

DCU Center

Worcester, MA



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